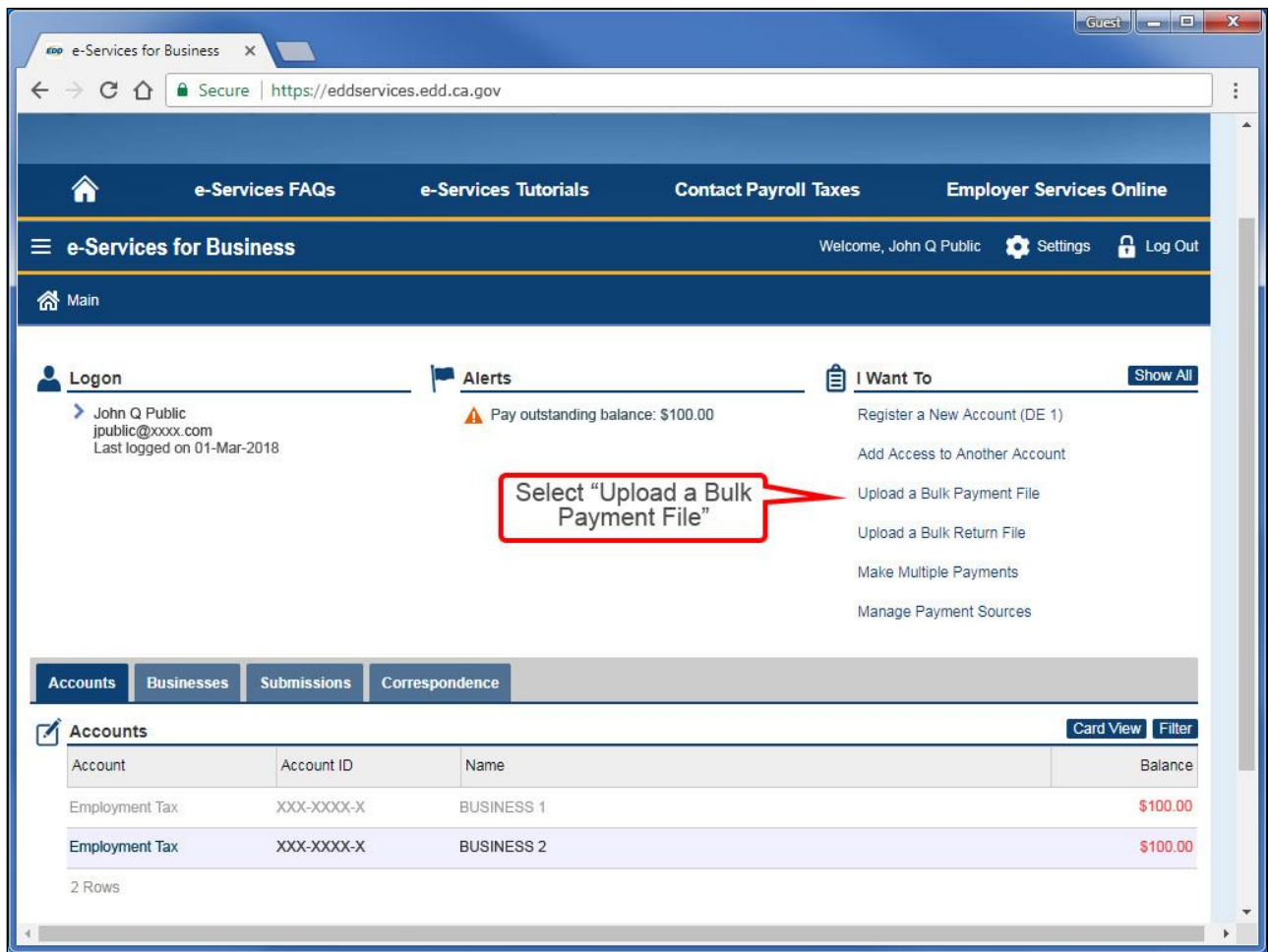I Want to Upload a
Bulk Payment File, Bulk Return File,
or Submit a Bulk Rate Inquiry

Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business.

This tutorial is for an employer representative/payroll agent who wants to make a bulk payment for many different accounts, file bulk returns, or submit bulk Unemployment Insurance (UI) rate requests.

Slide notes

We will begin at the e-Services for Business home page. Select the "Upload a Bulk Payment File" link from the "I Want To" menu.

Slide notes

If needed, select the "Instructions for CSV" or "Instructions for XML" link for assistance. For this example, we select "Instructions for CSV."

Slide notes

Here are the CSV file format instructions. When you are finished viewing the instructions, select "OK" to continue.
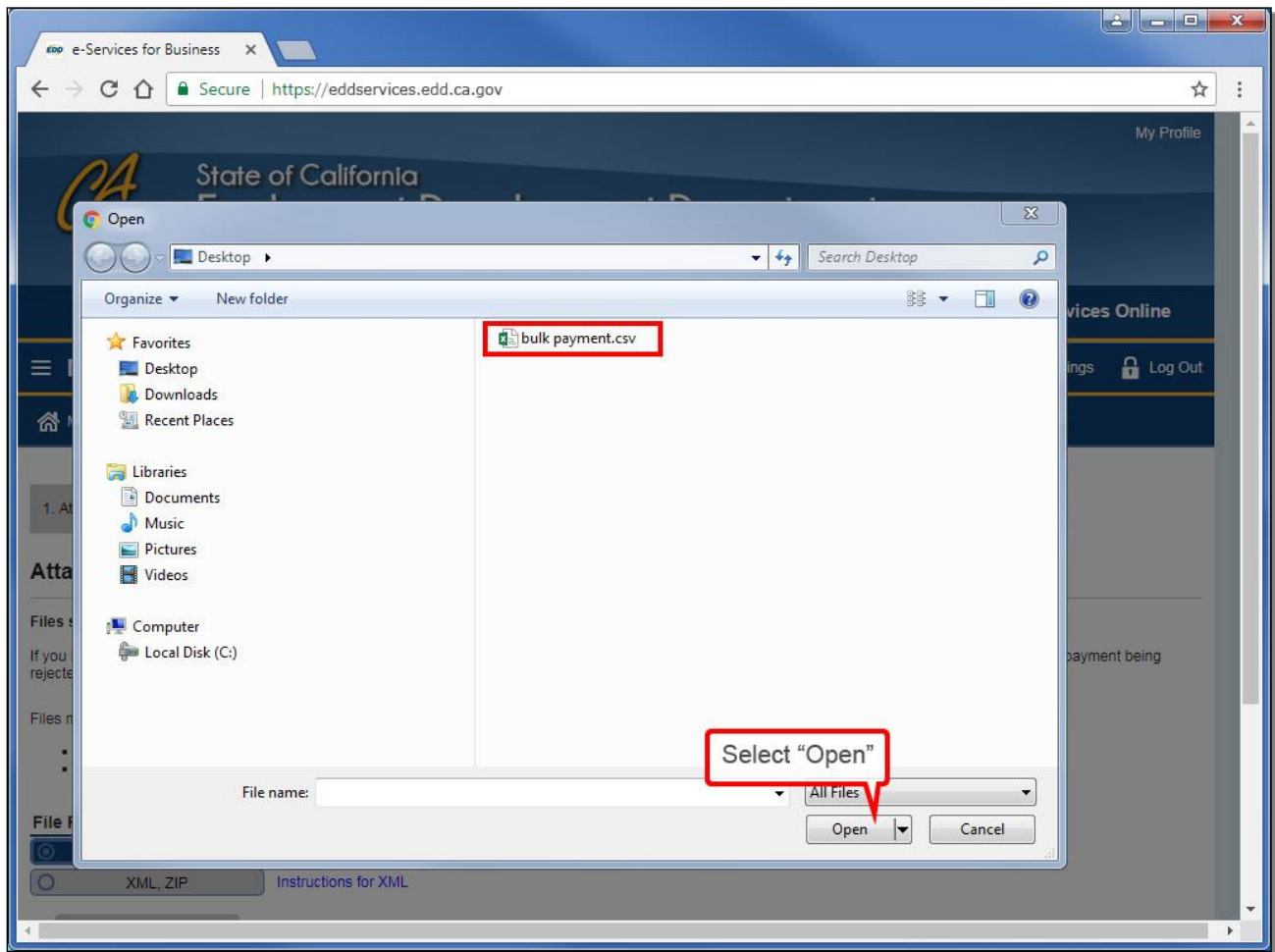
Slide notes

Select the File Format. For this example, we select CSV. Select "Add Attachment" to continue.
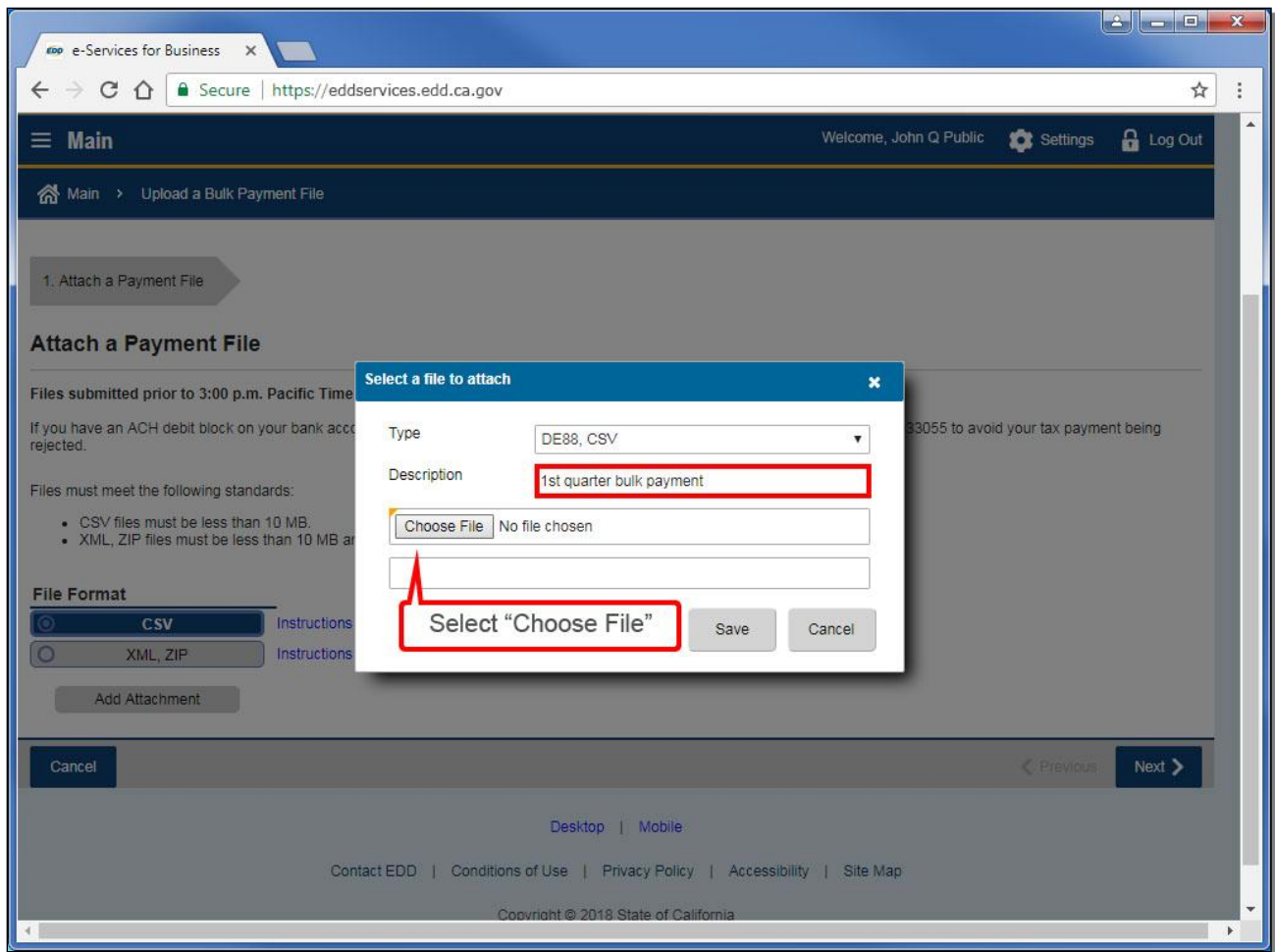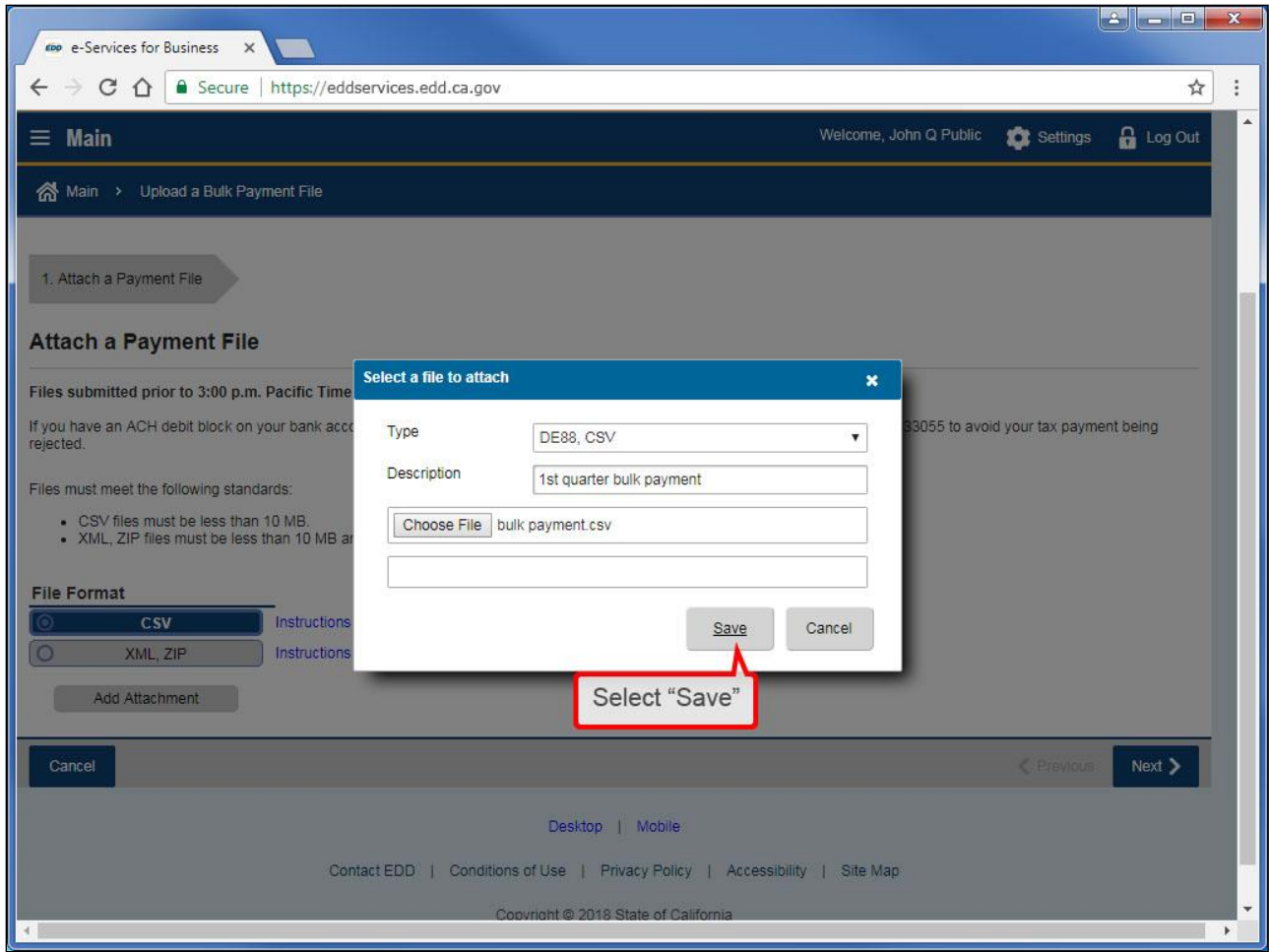
Slide notes

Fill in the "Description" field with a name that you will recognize and then select "Choose File" to find the file you want to import.

Slide notes

Choose the correct file to import, and then select "Open" to import the attachment.

Slide notes

Now the attachment has been imported. Select "Save."

Slide notes

Now you can see the attachment that has been imported. Select "Next" to continue.

Slide notes

Complete the "Contact" information for the person completing this request and select "Next" to continue.

Slide notes

Complete the "Contact Address" information for the person completing this request and select "Submit" to continue.
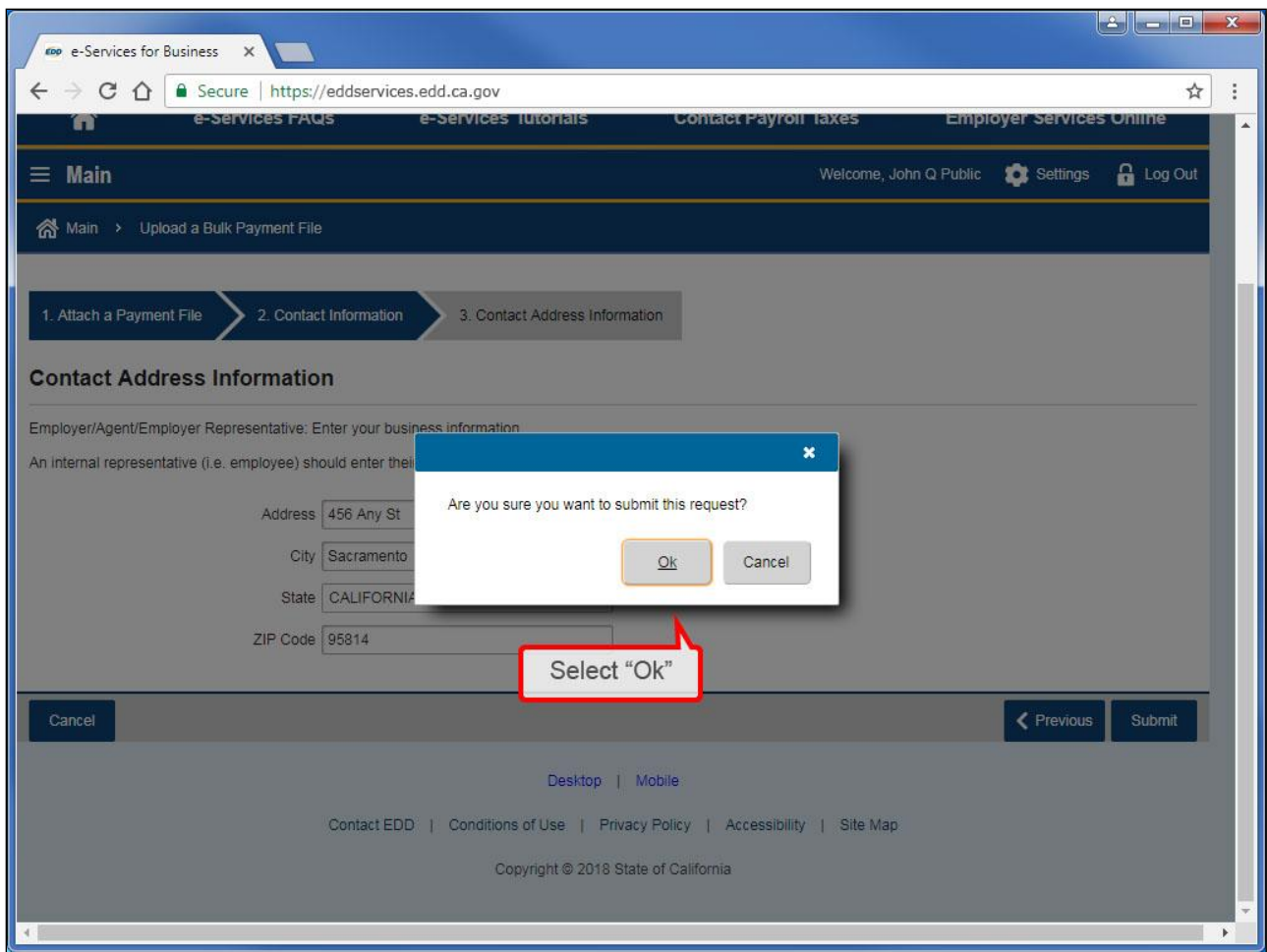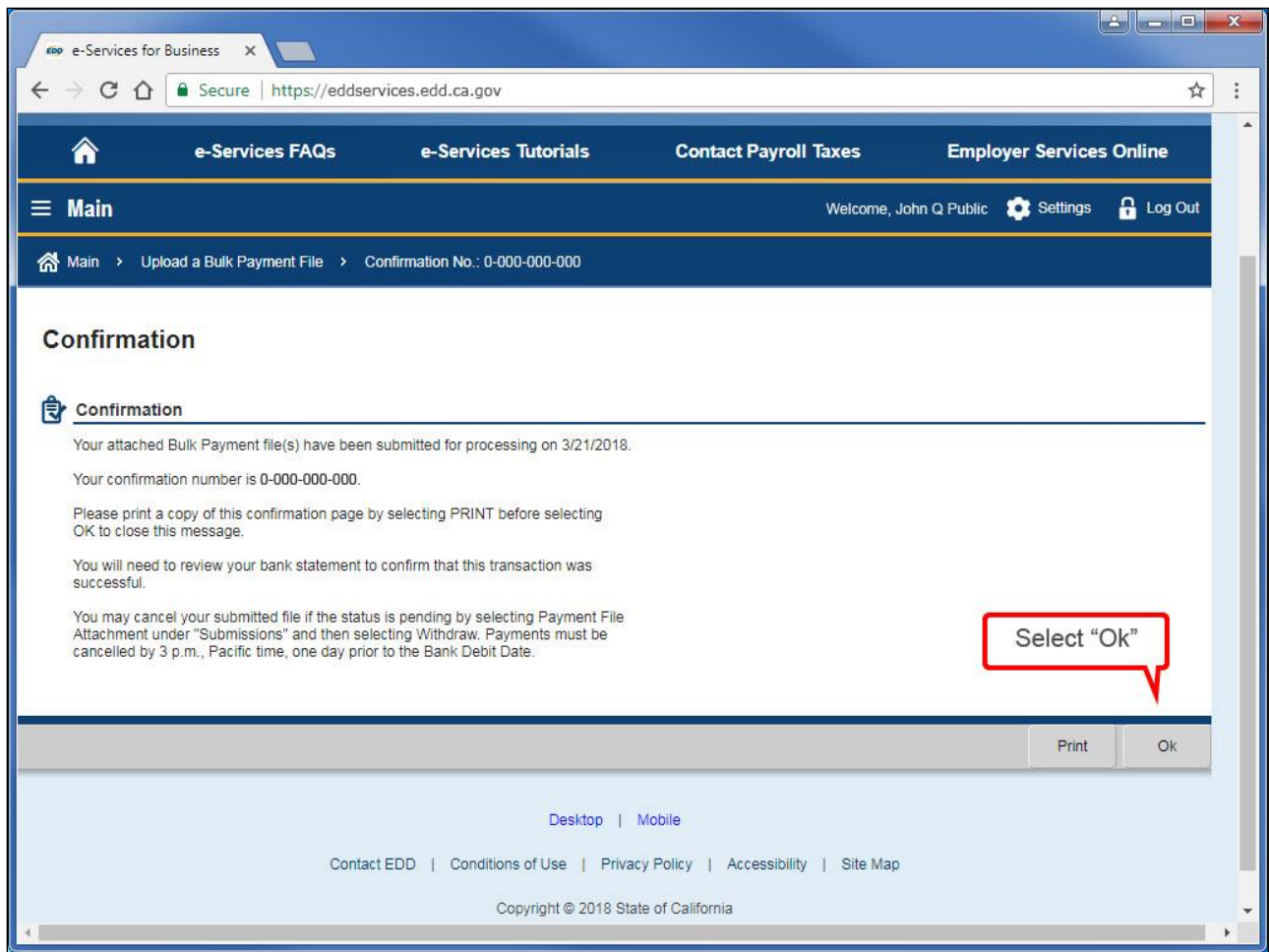
Slide notes

Are you sure you want to submit this request? Select "Ok."

Slide notes

Here is the confirmation page, including your confirmation number. Select "Ok" to complete this process and navigate back to the e-Services for Business home page.

Slide notes

Now, let's attach a bulk return file. Select the "Upload a Bulk Return File" link from the "I Want To" menu.

Slide notes

Select an attachment type. For this example, we select "Wage Report." Select "Next" to continue.

Slide notes

Select a form type. For this example, we select "DE9C." Select "Next" to continue.

Slide notes

Select a file format type. For this example, we select "XML" and then select "Add Attachment."
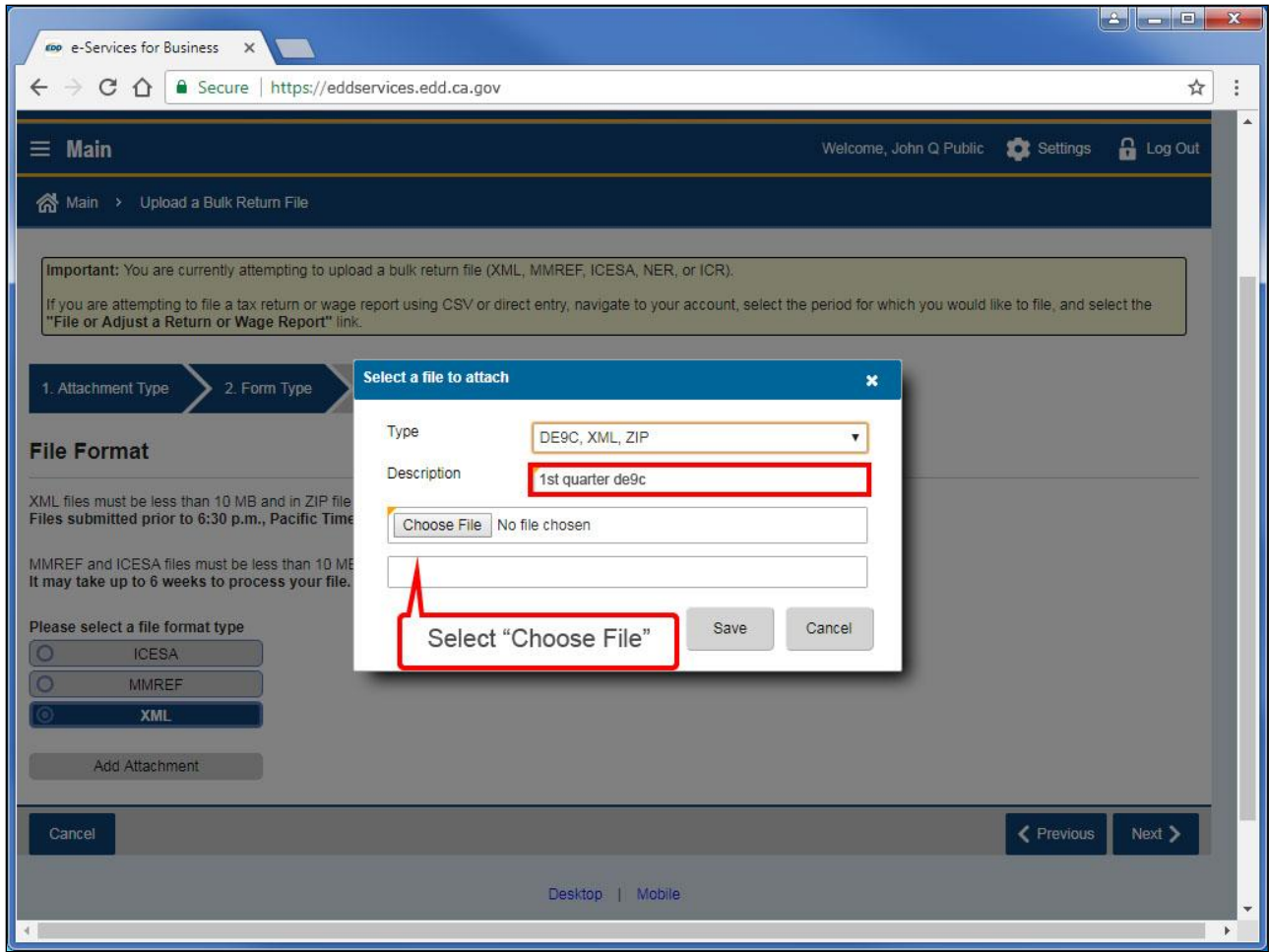
Slide notes

Enter a description of the file and then select "Choose File" to find the file you want to import.

Slide notes

Select the correct file and then select "Open" to import the attachment.
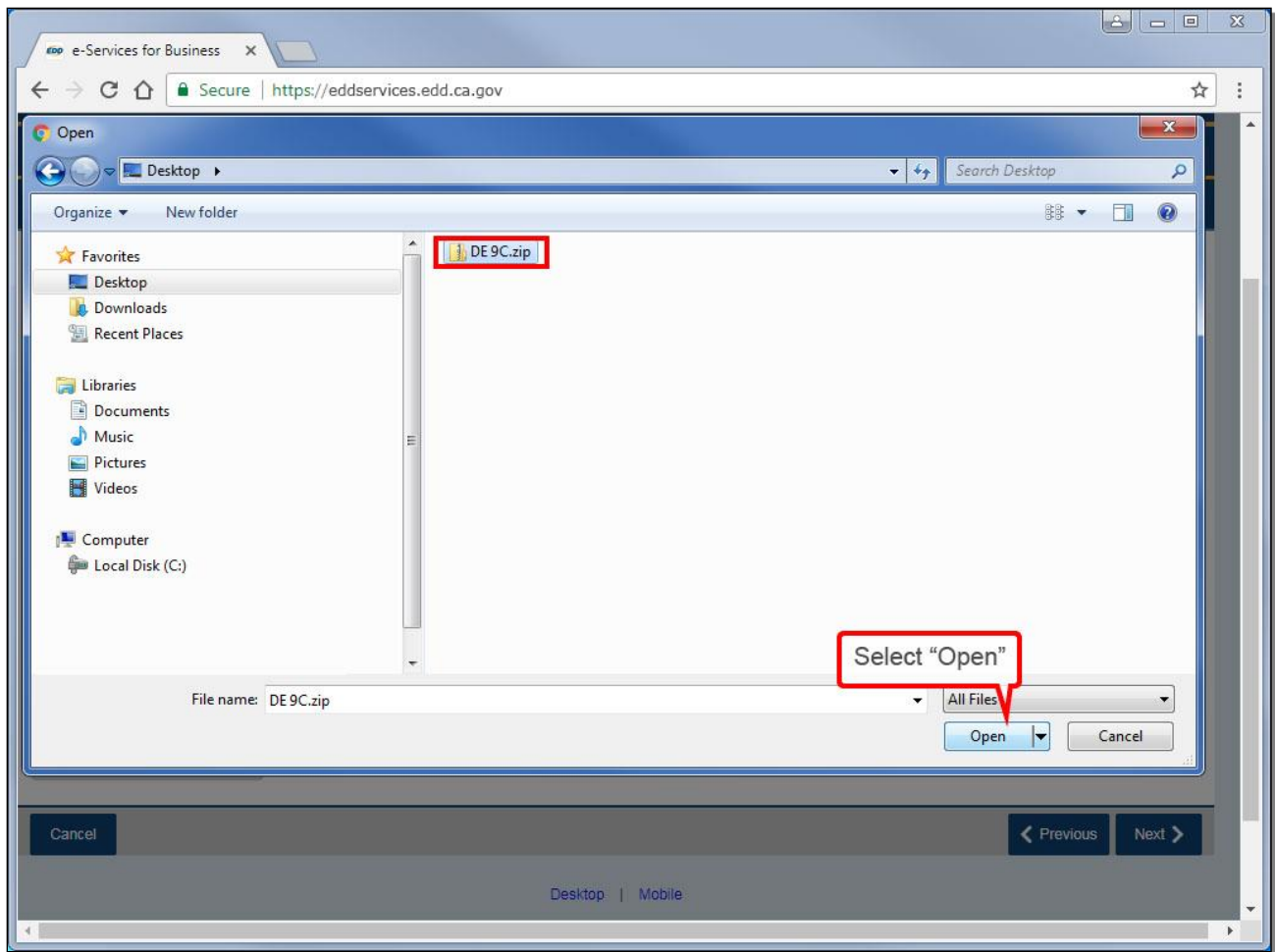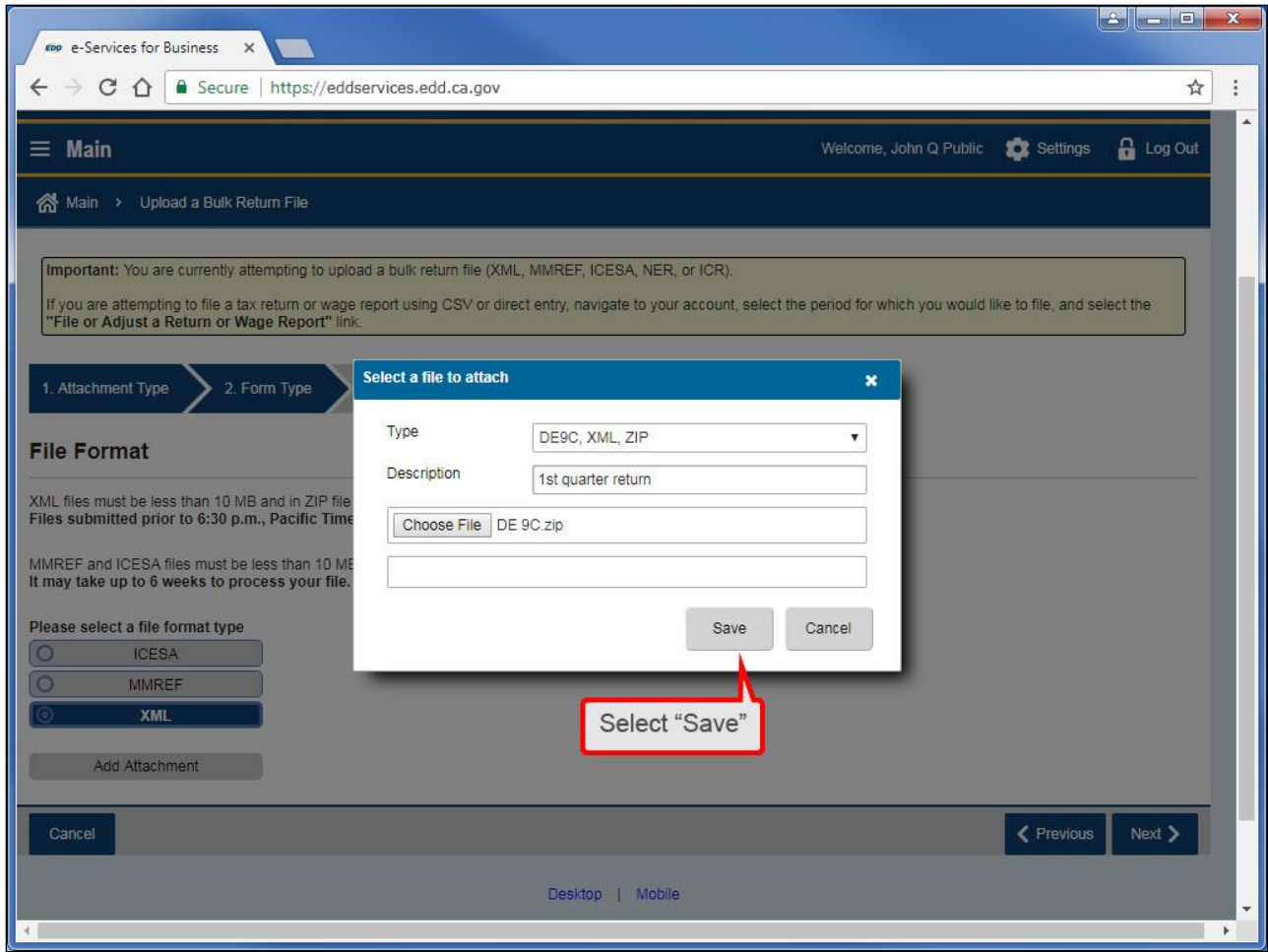
Slide notes

Select "Save" to continue.

Slide notes

Now you can see the attachment that has been imported. Select "Next" to continue.

Slide notes

Complete the "Submitter Information" and when complete, select "Next" to continue.

Slide notes

Complete the "File Information" and when complete, select "Next" to continue.

Slide notes

The declaration page is very important. This is where you declare that the information herein is true and correct to the best of your knowledge. When the information is complete, select "Submit."
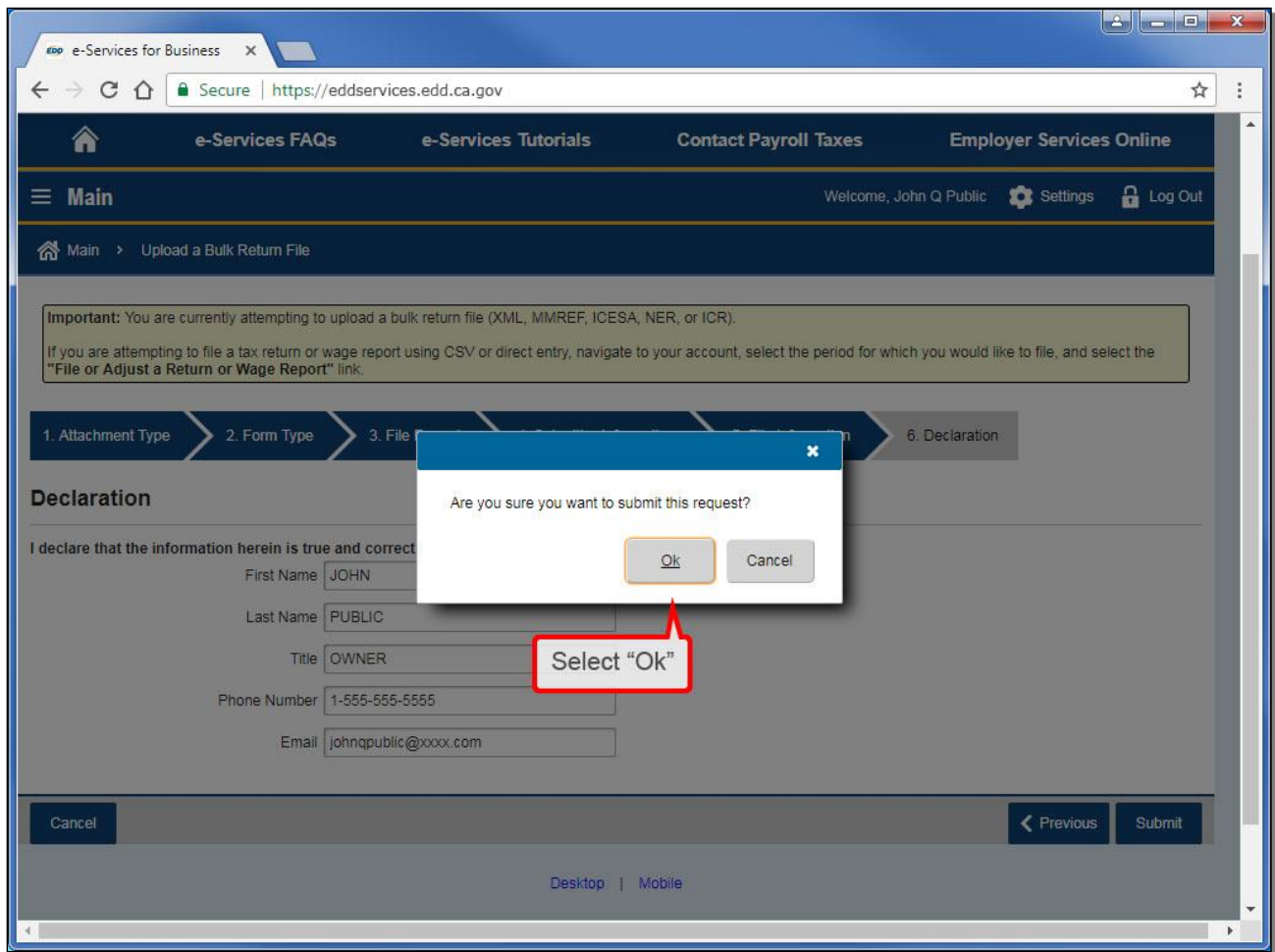
Slide notes

Are you sure you want to submit this request? Select "Ok."
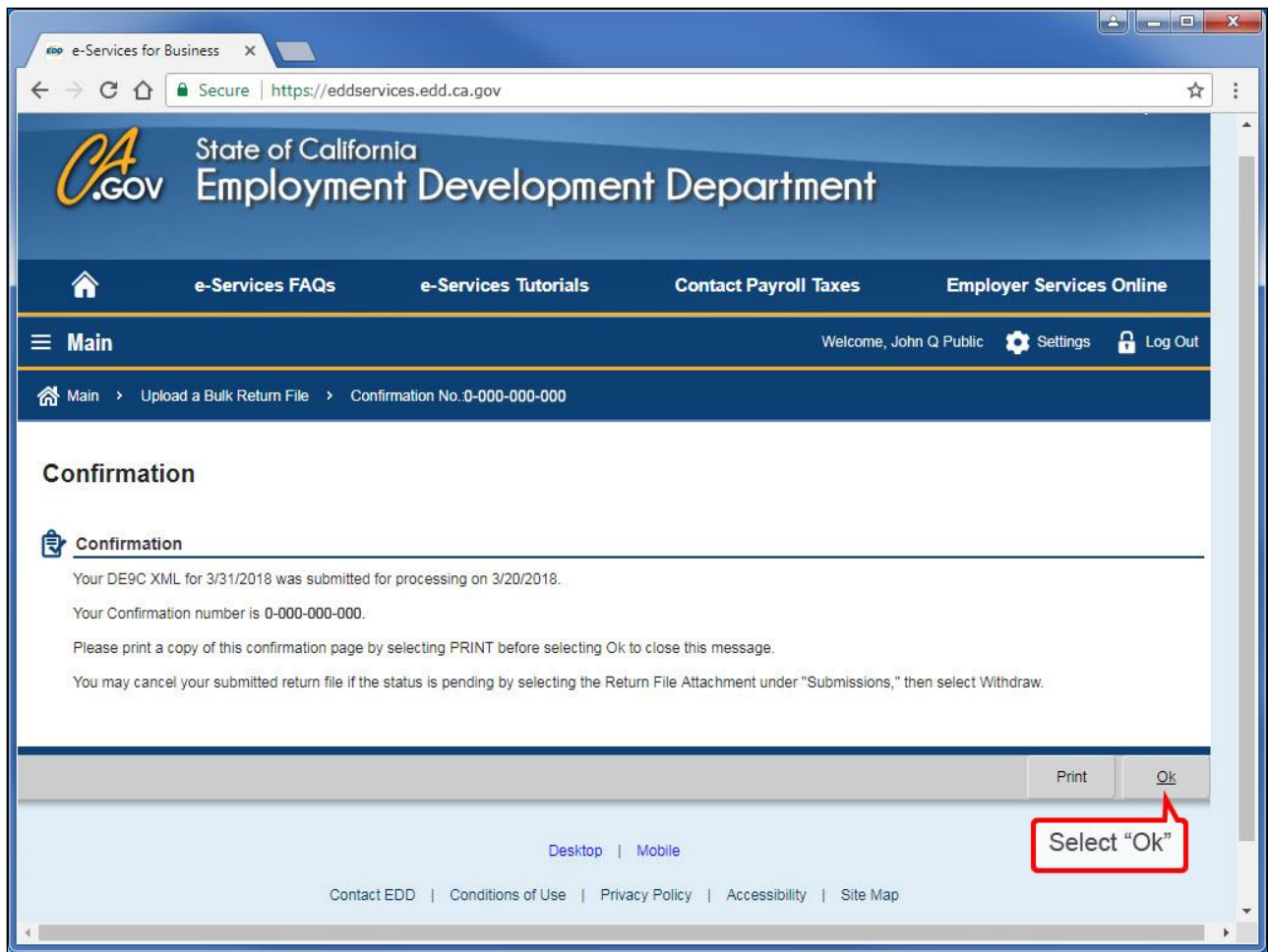
Slide notes

Here is the confirmation page. Your DE9C XML was submitted for processing. Select "Ok" to complete this process and to navigate back to the e-Services for Business home page.

Slide notes

Now let's submit a bulk rate inquiry. To begin, select the "Show All" link next to the "I Want To" menu.
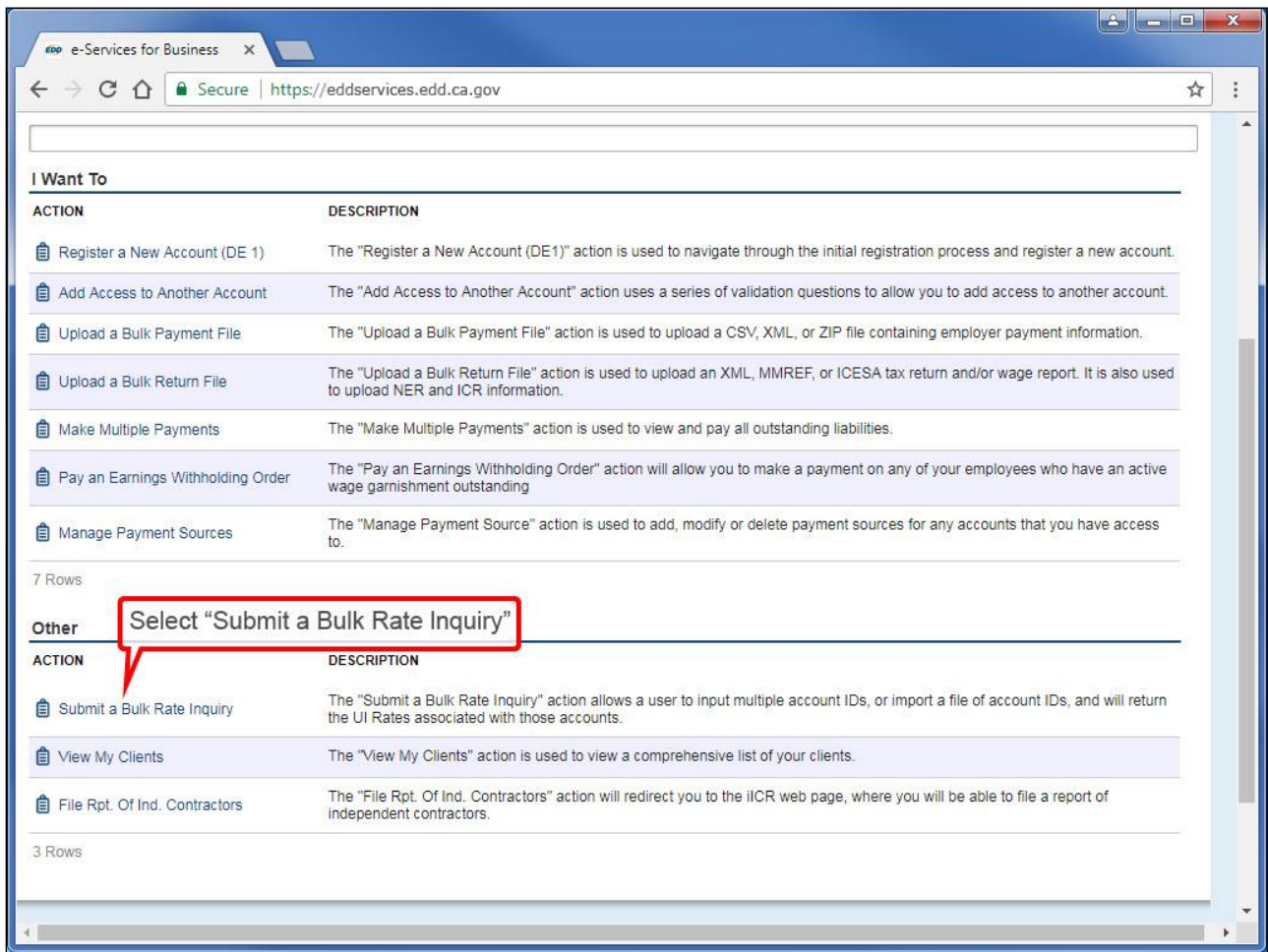
Slide notes

Select "Submit a Bulk Rate Inquiry."
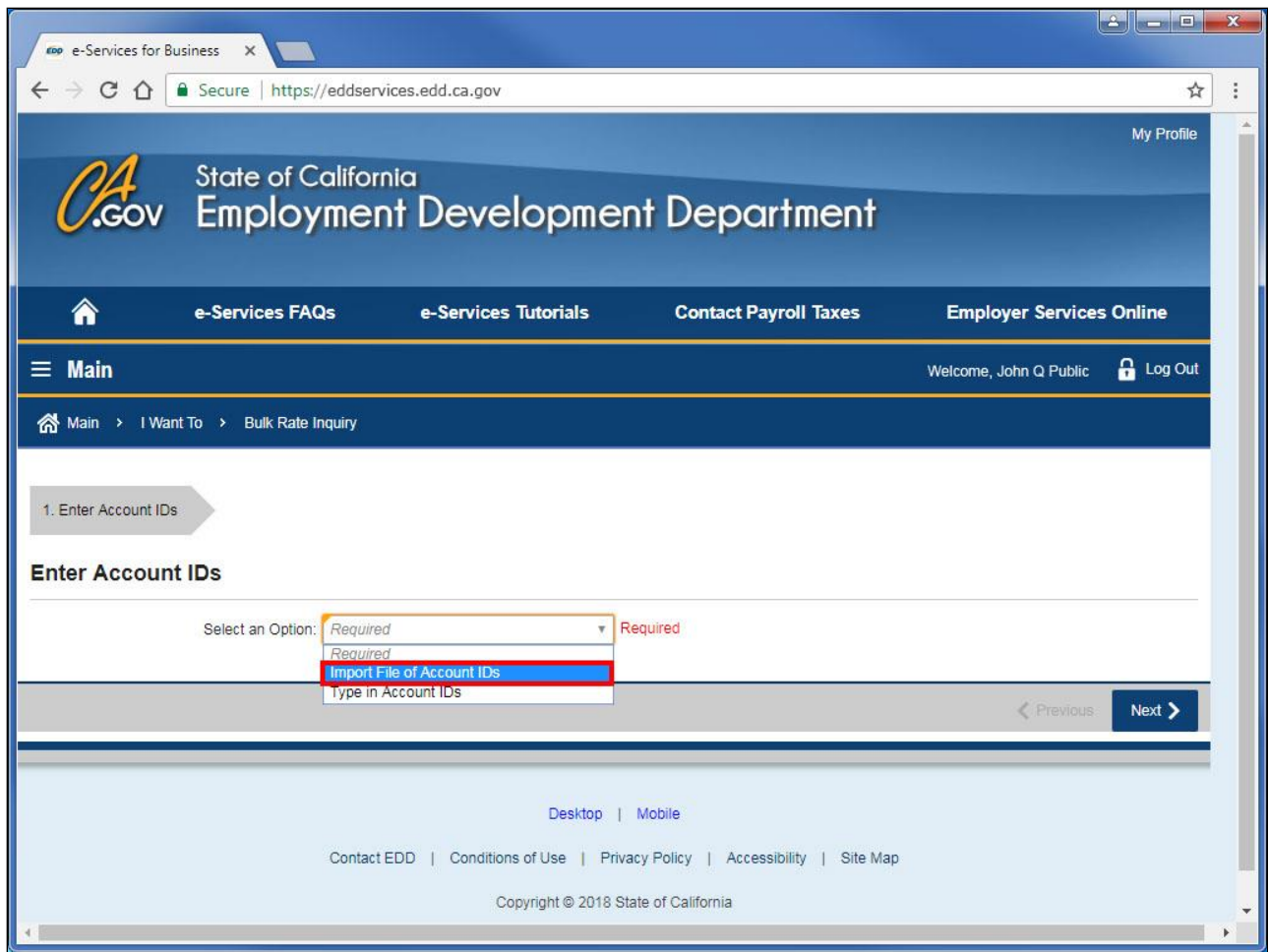
Slide notes

Select "Import File of Account IDs" or "Type in Account IDs." For this example, we select "Import File of Account IDs."

Slide notes

Select "Next" to continue.

Slide notes

Here are the instructions to import a CSV file from your computer. When you are finished viewing, select "Import File of Account IDs."
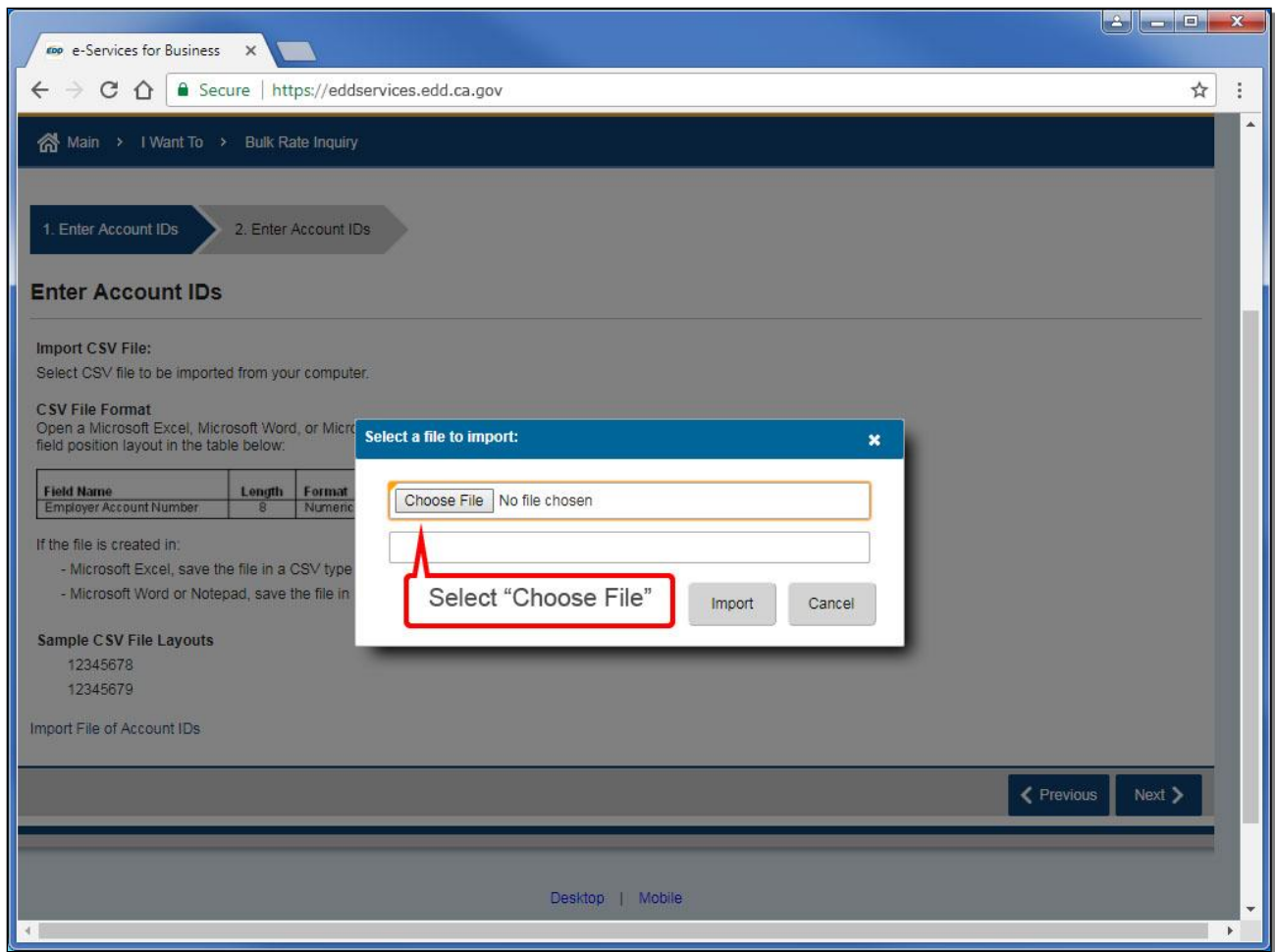
Slide notes

Select "Choose File" to find the file you want to import.
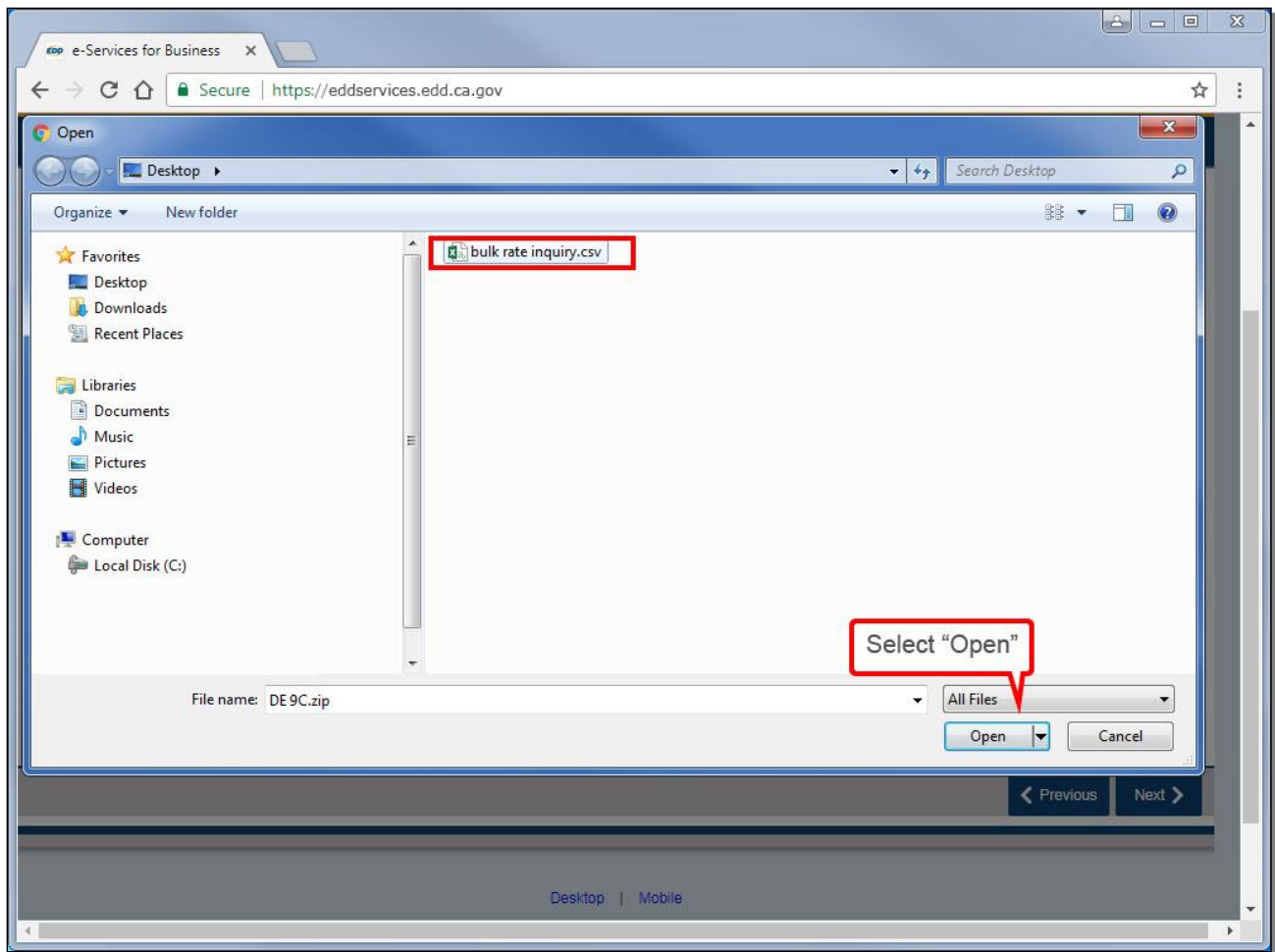
Slide notes

Choose the correct file to import and select "Open" to import the attachment.
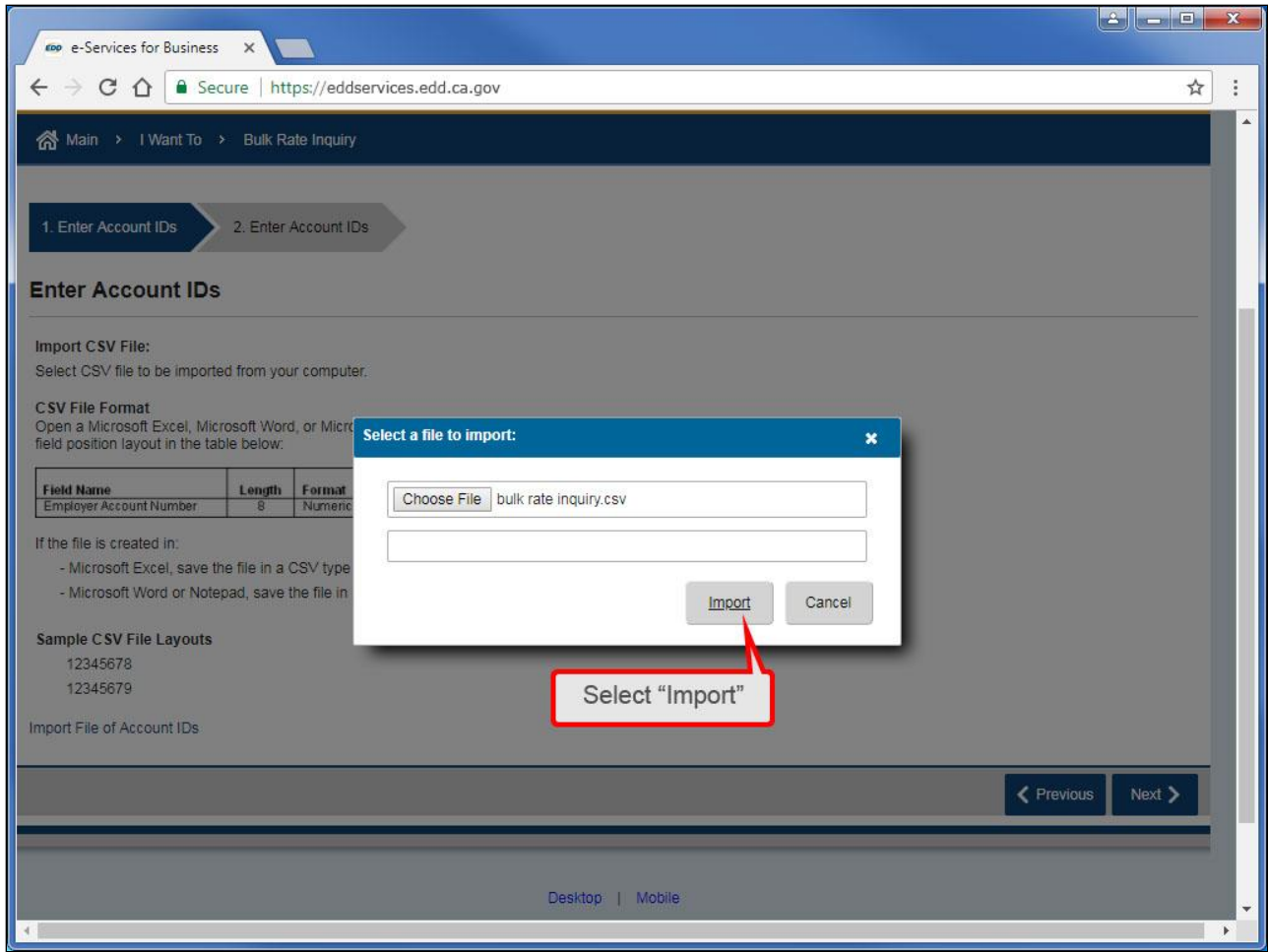
Slide notes

Now you can see the file. Select "Import" to complete your inquiry.

Slide notes

Select "Next" to continue.

Slide notes

For this example "2018" is already selected. If the EDD has Unemployment Insurance information for future years those options will be available to you. Select "Next" to continue.

Slide notes

Here is the rate for these three account numbers. When you are done viewing your tax rates, you can select the "Main" link to go back to the e-Services for Business home page. This completes the process for submitting a bulk rate inquiry.

Slide notes

Thank you for taking the time to watch this tutorial on how to upload a bulk payment file, upload a bulk return file, and submit a bulk rate inquiry.

Be sure to view our other tutorials demonstrating how to add a payment source, file return, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.